



DISTRICT SCHOOL BOARD OF PASCO COUNTY

Kurt S. Browning, Superintendent of Schools

7227 Land O' Lakes Boulevard • Land O' Lakes, Florida 34638

Purchasing Services

Michael J. Woodall, CPPO, Purchasing Agent

813/794-2221 Fax: 813/794-2111

727/774-2221 TDD: 813/794-2484

352/524-2221 email: mwoodall@pasco.k12.fl.us

June 4, 2013

MEMORANDUM

TO: Honorable School Board Members

FROM: Michael J. Woodall, CPPO, Purchasing Agent *MJW*

RE: Requesting Permission to "Piggy-Back" Duval County School Board
RFP #2-11/LG, Tax Sheltered Annuity Consulting
TSA Consulting Group

The District School Board of Pasco County currently is utilizing Duval County School Board's RFP #2-11/LG, Tax Sheltered Annuity Consulting through TSA Consulting Group. We are requesting to continue to utilize Duval County School Board's RFP #2-11/LG for Tax Sheltered Annuity Consulting for the third year covering the contract period of July 1, 2013 through June 30, 2014.

The Office for Employee Benefits and Risk Management (EBARM) is recommending that the District continue to "piggy-back" this RFP for the term of July 1, 2013 through June 30, 2014. Please see the attached memo from Ms. Mary Tillman, Director of EBARM, for detailed information. TSA Consulting Group has agreed in writing (attached) to extend the District all the terms, conditions and pricing of the Duval County School Board's RFP. Under DOE Rule 6A-1.012(6), the District is permitted to "piggy-back" other agencies bids or RFPs when it is in our best interest to do so.

We are requesting permission to "piggy-back" the Duval County School Board's RFP #2-11/LG contract for the third year term of July 1, 2013 through June 30, 2014 and to place a purchase order for \$43,152 (estimated cost to cover 9,300 employees; amount may vary slightly at the time the purchase order is placed) for the encumbrance in the next fiscal year. If you have any questions, please contact Ms. Mary Tillman or myself at your earliest convenience.

MJW/plh

Attachments

Date/Time: May 29, 2013 08:34:00



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Employee Benefits, Assistance & Risk Management
Mary Tillman, Director
813/ 794-2759 Fax: 813/ 794-2173
727/ 774-2759 TDD: 813/ 794-2484
352/ 524-2759 e-mail: mtillman@pasco.k12.fl.us

DATE: May 21, 2013
TO: Michael Woodall, Purchasing Agent
FROM: Mary Tillman, Director of EBARM
RE: TSA Consulting Group, Inc. renewal

Mary H. Tillman

The District will piggy-back the Duval County School Board RFP, period July 1, 2013 – June 30, 2014, for tax sheltered annuity consulting.

TSA Consulting Group, Inc. (TSA) provides education, required by IRS guidelines, to employees regarding voluntary retirement (tax sheltered) accounts as well as other consulting services. Services are provided at \$4.64 annually per employee, based on the appropriate “tier” for the number of Pasco employees, through June 30, 2014. Therefore the total amount of the contract will vary, depending on the actual number of District employees at the time services are provided. Although the contract allows for an annual 3% increase, for the third year in a row, TSA, mindful of the District’s budget constraints, has chosen not to implement the increase. The purchase order for 2013-14 will need to be \$43,152 to cover an estimated 9,300 employees. I, as well as the other Employee Benefits Department staff, have been very satisfied with the services from TSA. Also, I appreciate the decision by TSA not to implement the allowed increase again this year. TSA is a true partner to the District.

Please request permission from the Board to approve a third year term with TSA, covering July 1, 2013 through June 30, 2014. If you have any questions or need any additional information, please call me. As always, I appreciate the assistance that I have received from you and your staff during this process.



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 352/524-2221 e-mail: mwoodall@pasco.k12.fl.us

April 18, 2013

PIGGY-BACK REQUEST
RFP #: Duval County Schools #2-11/LG
RFP TITLE: Tax Sheltered Annuity Consulting

Yes, I agree to allow the District School Board of Pasco County to "piggy-back" the above-referenced RFP under its existing terms and conditions. The contract term will be **July 1, 2013 through June 30, 2014**. If you agree to allow this "piggy-back", please also include a current certificate of liability insurance naming the District School Board of Pasco County as a certificate holder.

No, I do not agree to permit a "piggy-back" off RFP #2-11/LG.

Company Name: TSA Consulting Group Inc

Signature: Janet Williamson Date: 4.19.13

Typed Name and Title: Janet Williamson, VP, Chief Operations Officer

Telephone (w/area code): 850.244.7306 Fax Number (w/area code): 850.244.7308

Email: jwilliamson@tsacg.com

By agreeing to renew, vendor acknowledges and agrees to be in compliance with the "Jessica Lunsford Act". Vendors conducting business, with the District School Board of Pasco County, who will (1) be at the school when students are present, or (2) have direct contact with students, or (3) have access to or control of school funds **must** be Level 2 fingerprinted by Human Resources. If any of the above applies to this contract, you **must** have those individuals Level 2 fingerprinted and screened by the Districts Human Resource Department prior to commencement of services or work and must provide a list of employees with renewal. Please contact 813/794-2521 to arrange for an appointment. Costs associated with this background screening are to borne by the vendor. You may access information regarding this law through the internet link: http://election.dos.state.fl.us/laws/051laws/ch_2005-028.pdf. This law is effective September 1, 2005.

The prospective vendor certifies, by submission and signature of this RFP renewal form, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction per the provisions of Florida Statute 287.133(2)(a).

PLEASE RETURN TO: DISTRICT SCHOOL BOARD OF PASCO COUNTY
 ATTN: Patty Hall, Buyer Assistant
 PURCHASING DEPARTMENT
 20430 GATOR LANE
 LAND O' LAKES, FL 34638
 (813) 794-2258 (PHONE) (813) 794-2111 (FAX)
phall@pasco.k12.fl.us